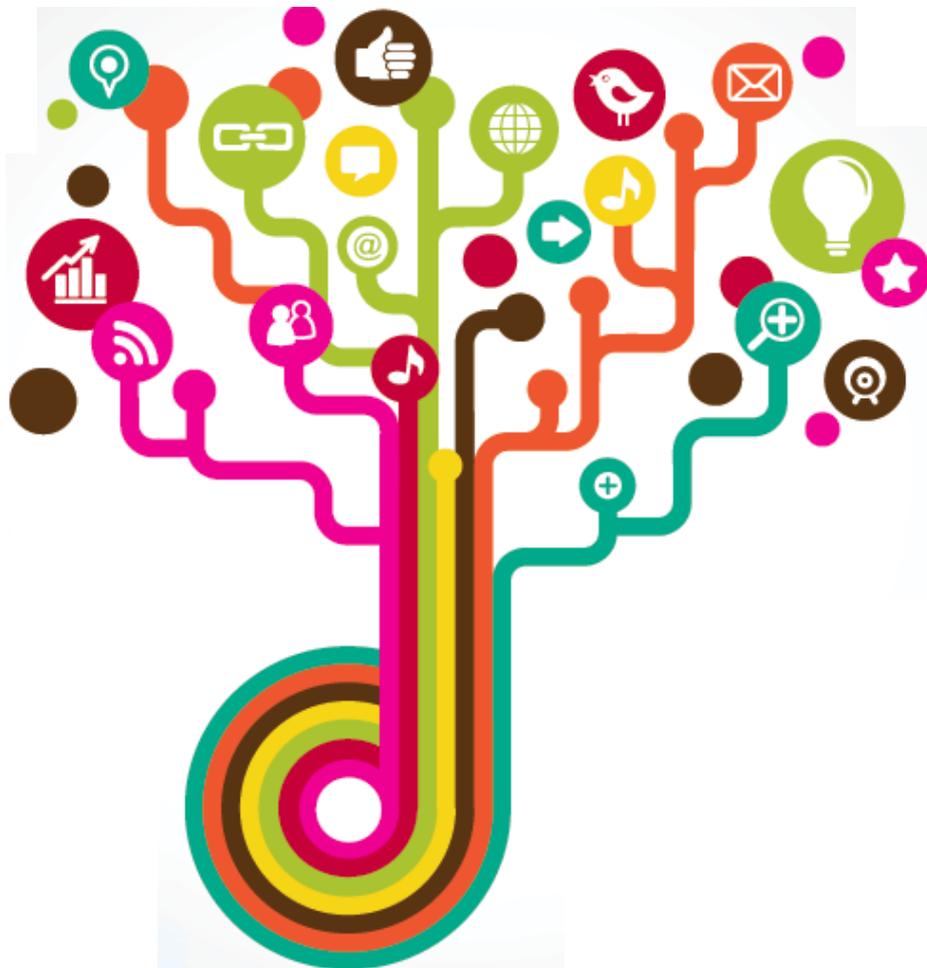


SOCIAL MEDIA MARKETING FAST START

A practical checklist for managing your social media accounts

Author: Carlton Jefferis and Marie Page



Introduction

Social media – part art, part science

Introduction - Social media and the art of conversation

Social media is both an **art and a science**. It's a science because you need to test and learn how the different social media tools work. You also need to know the rules of play and learn how to use each platform to maximum effectiveness.

But social media is also an art. Writing effective content is a highly creative skill. Those 140 characters of a tweet can cause a follower to click and engage or simply scroll on down. Getting the tone right in your conversation is also important. Choosing the correct tone can win you business, choose the wrong tone and you're in a Twitterstorm.

This is why social media responsibility should never be given solely to your intern/junior simply because they are a 'digital native'. Just because they use platforms socially does not mean they can make the transition to social media strategist, content creator, headline writer and frontline spokesperson for your organisation.

Social media are broadcast AND conversational media

Social media can and does work as a broadcast medium like email if you get the message relevance, targeting, timing and frequency right. Through developing a social media communications strategy, you can deliver relevant content, messages and offers to engage your audience, expand your reach and sell.

Remember too that social media is a conversational medium, not just a broadcast medium. Conversations are two-way, so you need to have resources in place to respond to the comments you will receive in a timely fashion. On some platforms, chiming in with a supplementary comment or question will continue the conversation, make your brand 'more human' and increase your reach.

You will also find customers having conversations about your brand with other customers on your social brand pages and elsewhere. You have to consider how can you monitor this and engage with it. How can you encourage positive word of mouth behaviour?

About Smart Insights

[Smart Insights](#) provides actionable marketing resources to help businesses succeed online. More than 80,000 members use our blog, sample marketing templates and weekly Emarketing Essentials newsletter to follow best practices and keep up-to-date with the developments that matter in digital marketing.

Our Expert members use our planning and management templates, video courses and guides to map, plan and manage their marketing using the RACE Planning framework.

✔ See these [10 reasons why Expert members use our resources](#)

Recommended resource? Smart Insights Social media marketing resources

We have grouped our **Expert member toolkit resources on social media marketing** for access via our [Social media marketing Hub page](#). If you're serious about improving your social media marketing and developing a more strategic approach, we recommend our in-depth [7 Steps to Social Media Strategy](#) which shows how to develop a social media strategy and gives many practical tips on making your social media marketing more effective.

To help you or your team get up-to-speed on social media, we have other resources for Expert members in our social media toolkit including in-depth 'Smarter guides' to setting up an running social media on each of the networks. We update these regularly.

- ✔ [Managing social media guide](#)
- ✔ [Social media marketing audit](#)
- ✔ [Example social media marketing plan](#)
- ✔ [Editorial calendar spreadsheet](#)
- ✔ [Facebook Marketing Guide](#)
- ✔ [Google+ Guide](#)
- ✔ [Instagram Marketing Guide](#)
- ✔ [LinkedIn Marketing Guide](#)
- ✔ [Pinterest Marketing Guide](#)
- ✔ [Twitter Marketing Guide](#)
- ✔ [YouTube Marketing Guide](#)

About the Digiterati

Marie Page and Carlton Jefferis, co-founders of The Digiterati, have written this social media checklist. Marie has also written the [Smart Insights Guide to Facebook Marketing](#). Contact them at www.the-digiterati.com for digital marketing consultancy, training and advice.

Brands, agencies and SMEs are struggling to keep up with a constantly evolving digital marketing landscape and need support from time-to-time to troubleshoot, optimise and up-skill. But where do you go for help?

That is where The Digiterati can step in.

The Digiterati is a UK-based team of experienced senior marketing practitioners with backgrounds in world-leading brands, agencies and technology startups. We work alongside your own employees and teams to build and strengthen your in-house digital capability across a range of digital marketing disciplines including:

- ✔ Social media marketing
- ✔ Email marketing
- ✔ Content marketing
- ✔ Online advertising
- ✔ Digital marketing training
- ✔ Websites, mobile, apps and infrastructure
- ✔ Marketing technology support

Clients include in-house teams as well as agencies who like to access our deeper level of expertise in particular platforms and approaches.

We're flexible, responsive and creative, but unlike a lot of specialists we don't hoard our knowledge. In fact our preference is to coach clients so that they are up-skilled and empowered to deliver solo when required. We promise no-nonsense commercial advice, and hands-on input, from a senior consultant, no matter what.

About this social media marketing checklist

This checklist is structured around these 7 key steps to social media marketing:

- ✔ 1 Review your social media capabilities and set goals
- ✔ 2 Devise your social media strategy
- ✔ 3 Set up / update your social media accounts
- ✔ 4 Plan and create your content
- ✔ 5 Increase reach and build followers
- ✔ 6 Evaluation, tracking and optimisation
- ✔ 7 Use content to build email lists/integrate with other marketing

Managing social media marketing checklist

Social media activity to manage	Recommended Expert member resources
1 Review your social media capabilities and set goals	
<p>1. Assess your current social media activities</p> <ul style="list-style-type: none">○ <i>Number and quality of followers</i>○ <i>Degree of engagement</i>○ <i>Type of content against frequency and effectiveness measured by reach, engagement, virality, etc</i>○ <i>Response time and tone of responses to user comments and questions</i>○ <i>Use and effectiveness of paid for content</i>○ <i>Effectiveness of channels and content at delivering to objectives (i.e. clicks to website, product purchase, email capture)</i>○ <i>Are you utilising the full potential of each platform?</i> <i>(See our social network guides for best practice)</i>○ <i>To what degree are you using technology to assist? (IFTTT, software like Hootsuite, Sprout Social)</i>○ <i>To what degree is your Online Value Proposition (OVP) apparent in your social media?</i>○ <i>Which platforms are you not using? Should this be reviewed</i>○ <i>What is already being said about your brand on platforms outside of your control?</i>	<p><input checked="" type="checkbox"/> Social media marketing audit template</p> <p><input type="checkbox"/></p>

	Social media activity to manage	Recommended Expert member resources	
2.	<p>Review your ‘content hub’ integration including website and landing pages</p> <ul style="list-style-type: none"> ○ Are your web properties optimised to attract and convert inbound social traffic? ○ Are your web properties optimised for easy distribution of your content to social networks (e.g. social share buttons, meta tags, image sizes, headlines) ○ Do you have a content hub such a blog providing ‘owned’ content from which to link out across social platforms? ○ Are you maximising the use of your existing web content, for example through repurposing? 	<p>✔ 7 Steps to managing content marketing guide</p>	<input type="checkbox"/>
3.	<p>Review what the competition are doing</p> <ul style="list-style-type: none"> ○ As per the above, critique the social media activities of the competition. Can you learn from them? ○ What best practice in other markets can you find to adopt as ideas yourself? 	<p>✔ Competitor benchmarking guide</p>	<input type="checkbox"/>
4.	<p>Audit the capability and resource availability of your team (in-house and agency) Review what the competition are doing</p> <ul style="list-style-type: none"> ○ Who does what? ○ Strengths and weaknesses of the team ○ Review costs and budgets ○ Training needs ○ Do you have a social media policy for employees? 	<p>✔ Managing social media guide</p>	<input type="checkbox"/>
5.	<p>Define objectives for future social media marketing</p> <ul style="list-style-type: none"> i. Clicks ii. Sales iii. Leads including email signups iv. Brand awareness v. Customer service 	<p>✔ 7 Steps to Social Media Strategy</p>	<input type="checkbox"/>

Social media activity to manage	Recommended Expert member resources
<h2>2 Develop your social media strategy</h2>	
<p>6. Prioritise five key activities for managing social media marketing</p> <ol style="list-style-type: none"> 1. <i>Define listening and reputation management strategy.</i> 2. <i>Transform the brand through social media.</i> 3. <i>Acquire new customers and increase sales to existing customers.</i> 4. <i>Deliver customer service.</i> 5. <i>Harness insights to develop the brand using social media optimisation (SMO).</i> 	<p>✔ 7 Steps to Social Media Strategy <input type="checkbox"/></p>
<p>7. Prioritise platforms - Which platforms?</p> <ul style="list-style-type: none"> ○ <i>Standalone or integrated?</i> ○ <i>Combined with a content hub (e.g. blog)</i> 	<p>See our Expert members guides to the core social networks for more details. <input type="checkbox"/></p> <ul style="list-style-type: none"> ✔ Facebook Marketing Guide ✔ Google+ Guide ✔ Instagram Marketing Guide ✔ LinkedIn Marketing Guide ✔ Pinterest Marketing Guide ✔ Twitter Marketing Guide ✔ YouTube Marketing Guide
<p>8. Prioritise platforms - Platform approaches?</p> <ul style="list-style-type: none"> ○ <i>Who to target (demographics, geographics) (by platform)</i> ○ <i>Type and tone of content (what can be repurposed and how?)</i> ○ <i>Degree of interaction and response times</i> ○ <i>Frequency and timing</i> ○ <i>Integration with other marketing and social media</i> ○ <i>Balance of organic vs paid (if appropriate)</i> 	<p>See our Expert members guides to the core social networks for more details. <input type="checkbox"/></p> <ul style="list-style-type: none"> ✔ Facebook Marketing Guide ✔ Google+ Guide ✔ Instagram Marketing Guide ✔ LinkedIn Marketing Guide ✔ Pinterest Marketing Guide ✔ Twitter Marketing Guide ✔ YouTube Marketing Guide

Social media activity to manage		Recommended Expert member resources	
9.	<p>Delivery</p> <ul style="list-style-type: none"> ○ <i>Delivery</i> ○ <i>Who does what?</i> ○ <i>What are the training needs of the team?</i> ○ <i>In-house or agency involvement?</i> ○ <i>Cover for holiday and sickness.</i> ○ <i>Weekend and evening cover?</i> 	<input checked="" type="checkbox"/> Managing social media guide	<input type="checkbox"/>
10.	<p>Policy and governance decisions</p> <p><i>Policy decisions: involve key stakeholders in developing policies around the following:</i></p> <ul style="list-style-type: none"> ○ <i>Social media policy</i> ○ <i>Compliance</i> ○ <i>Employee policy - provide clear guidelines for employees</i> ○ <i>Handling abusive/critical content</i> ○ <i>Removing content</i> ○ <i>Crisis management</i> ○ <i>Intellectual property and copyright</i> ○ <i>Monetisation e.g. hosting ads on YouTube channel</i> 	<input checked="" type="checkbox"/> Managing social media guide	<input type="checkbox"/>

Social media activity to manage	Recommended Expert member resources
<h2>3 Set up / update your social media accounts</h2>	
<p>11. Update social media accounts</p> <p><i>If this is all new to you, you will need to set up a profile on your chosen social media platforms. Regardless of newness, take this opportunity to</i></p> <ol style="list-style-type: none"><i>1. Protect intellectual property rights by registering usernames related to your business and trademarks so they can't be used by others. This is advisable for all major social platforms, even those you do not plan to actively use.</i><i>2. Review your "About" text</i><i>3. Review your categorisation category</i><i>4. Review any cover images on your channel/ home page etc. Optimal dimensions often change. Are yours working? What about on mobile?</i><i>5. Review the layout of your profiles</i><i>6. Claim your vanity URLs. This is often related to point 1, but sometimes you will need to have performed certain tasks or been active for a period of time before being invited to claim the vanity URL.</i><i>7. Consider setting up a URL shortener with a custom domain which you use when sharing links. Use services like Bitly or TinyURL.</i>	<p>See our Expert members guides to the core social networks for more details. <input type="checkbox"/></p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> Facebook Marketing Guide<input checked="" type="checkbox"/> Google+ Guide<input checked="" type="checkbox"/> Instagram Marketing Guide<input checked="" type="checkbox"/> LinkedIn Marketing Guide<input checked="" type="checkbox"/> Pinterest Marketing Guide<input checked="" type="checkbox"/> Twitter Marketing Guide<input checked="" type="checkbox"/> YouTube Marketing Guide

Social media activity to manage	Recommended Expert member resources
<h2>4 Plan and create your content</h2>	
<p>12. Plan your content formats</p> <p><i>Devise a list of different "physical" types of content you will use by platform. Consider frequency of each. So for Facebook this could be:</i></p> <ul style="list-style-type: none">○ <i>Status updates</i>○ <i>Photos</i>○ <i>Links</i>○ <i>Videos</i>○ <i>Events</i>○ <i>Offers</i>○ <i>Apps</i>	<p><input checked="" type="checkbox"/> 7 Steps to managing content marketing guide</p> <p><input type="checkbox"/></p>

Social media activity to manage	Recommended Expert member resources	
<p>13. Plan and implement your content types</p> <p><i>Then consider other aspects of content type, for instance:</i></p> <ul style="list-style-type: none"> ○ <i>Curated content (such links to other organisations articles)</i> ○ <i>Product related</i> ○ <i>People related</i> ○ <i>Questions</i> ○ <i>Surveys</i> ○ <i>Memes</i> ○ <i>Guest pieces</i> ○ <i>Emotional - evoking awe, anger, anxiety (see Berger and Milkman, 2012)</i> ○ <i>Funny (see Berger and Milkman, 2012)</i> ○ <i>Relational (see Ahuja and Medury, 2010)</i> ○ <i>Relevant (see Ahuja and Medury, 2010)</i> ○ <i>Controversy</i> ○ <i>Educational</i> ○ <i>Entertaining (see Taylor 2009)</i> ○ <i>Topical (Christmas, Halloween, Thanksgiving, Wimbledon etc)</i> ○ <i>Sub categories relevant to your industry/product range</i> ○ <i>Setting up interest groups (for instance on LinkedIn)</i> ○ <i>User generated content</i> 	<p><input checked="" type="checkbox"/> 7 Steps to managing content marketing guide</p>	<p><input type="checkbox"/></p>

Social media activity to manage	Recommended Expert member resources
<p>14. Devise and implement content calendar</p> <p><i>See the different example editorial and content calendar formats.</i></p> <ol style="list-style-type: none"> 1. <i>Start publishing your content. Follow your content calendar but create some flex to include topical content that you won't have planned.</i> 2. <i>Where appropriate pay to further promote your content.</i> 3. <i>Profile your content in other media</i> 4. <i>On some social networks you will be able to pay to further promote or enhance content (e.g. Twitter promoted tweets, Facebook promoted posts)</i> 5. <i>Perform daily checklist tasks:</i> <ul style="list-style-type: none"> ○ <i>Respond to messages/tweets/comments as appropriate with a reply or a Like or retweet etc.</i> ○ <i>Review any scheduled content for relevance (e.g. if situation changes)</i> ○ <i>Review paid promotion response and adjust as necessary</i> ○ <i>Review and respond to any comments or replies on paid ads. This is so often overlooked!</i> 	<p><input checked="" type="checkbox"/> Editorial calendar spreadsheet <input type="checkbox"/></p>

Social media activity to manage	Recommended Expert member resources
<h2>5 Increase reach and build followers</h2>	
<p>15. Improve organic distribution</p> <p><i>Consider these non-paid techniques:</i></p> <ol style="list-style-type: none"> 1. <i>Links to social media profiles on all relevant media (website, emails, advertising etc)</i> 2. <i>Implement social sharing buttons and tools across all web and email communications (e.g. like/pin/tweet buttons and Rich Pins, Twitter Cards, Open Graph).</i> 3. <i>Features about social media presence in newsletters and emails to mailing list (try to find an angle - "you might have missed this if you weren't following us on Facebook")</i> 4. <i>Competitions (sign-up to enter, re-tweet to enter)</i> 5. <i>Apps/white papers (email address capture in return for unique content/offers/coupons etc)</i> 6. <i>Use hashtags to increase your chances of being found in search. Similarly tag influencers in updates.</i> 	<p>See our Expert members guides to the core social networks for more details. <input type="checkbox"/></p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Facebook Marketing Guide <input checked="" type="checkbox"/> Google+ Guide <input checked="" type="checkbox"/> Instagram Marketing Guide <input checked="" type="checkbox"/> LinkedIn Marketing Guide <input checked="" type="checkbox"/> Pinterest Marketing Guide <input checked="" type="checkbox"/> Twitter Marketing Guide <input checked="" type="checkbox"/> YouTube Marketing Guide
<p>16. Improve paid distribution</p> <p><i>Consider these techniques for paid ads</i></p> <ol style="list-style-type: none"> 1. <i>Ads on relevant platforms (remember on some platforms there are multiple ad types to utilise - Facebook has ads that will help promote the Page as well as alternatives to promote pieces of content)</i> 2. <i>Install conversion tags on your web properties to track conversions (e.g. post-purchase thank you page, sign-up confirmation page)</i> 3. <i>Ads to your sign-up mechanisms (competitions etc)</i> <p><i>Is inbox delivery reported to show overall % delivery?</i></p>	<p>See our Expert members guides to the core social networks for more details. <input type="checkbox"/></p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Facebook Marketing Guide <input checked="" type="checkbox"/> Google+ Guide <input checked="" type="checkbox"/> Instagram Marketing Guide <input checked="" type="checkbox"/> LinkedIn Marketing Guide <input checked="" type="checkbox"/> Pinterest Marketing Guide <input checked="" type="checkbox"/> Twitter Marketing Guide <input checked="" type="checkbox"/> YouTube Marketing Guide

Social media activity to manage	Recommended Expert member resources
<h2>6 Evaluation, tracking and Optimisation</h2>	
<p>17. Consider these optimisation and improvement techniques</p> <p><i>1. Regularly review effectiveness using monitoring tools like Facebook and LinkedIn Insights, Twitter Analytics, YouTube Analytics, Google Analytics (use UTM campaign tracking to drill down to specific pieces of content)</i></p> <p><i>Review both content, time of posting but also who your subscribers are and when they are online</i></p> <p><i>2. Make changes based on what you learn</i></p> <p><i>3. Experiment with posting at different times of day, different content lengths, content types etc. Learn from the response. Note: treat the guru's "best time/day to post advice" with extreme caution - it won't necessarily be the case for your audience.</i></p> <p><i>4. Consider re-posting content multiple times a day/week. Many experts frown upon this but it is a simple fact that many people will never see your content. This is especially true of platforms with no algorithm, such as Twitter or Instagram. Repeating with a slightly altered content can significantly increase results. Again, test this and monitor your results to see what works best for your business. Every business is different.</i></p> <p><i>5. Stop using content that bombs. Fans don't like lame content and some algorithms will penalise you for poorly engaging or overly promotional content.</i></p> <p><i>Standard reporting of subscriber engagement and response.</i></p> <p><i>6. Don't put all your eggs in one basket! The landscape evolves continually and it would be unwise to base your business around a single social channel. Social is only one part of a digital marketing strategy.</i></p> <p><i>7. Never stop learning. Use of these platforms evolves over time. What was once cutting edge is now passe. Watch what other brands do and</i></p>	<p><input checked="" type="checkbox"/> 7 Steps to Google Analytics Guide</p> <p><input type="checkbox"/></p>

Social media activity to manage	Recommended Expert member resources
<h2>7 Use content to build email lists / integrate with other marketing</h2>	
<p>18. Apply techniques to increase email capture</p> <ol style="list-style-type: none"> 1. Retarget your website visitors on Facebook using Custom Audiences with Facebook ads. Similarly, you can achieve this on Twitter using Tailored Audiences with Twitter ads. 2. Lead-gate apps on Facebook: offer a compelling incentive for the user to provide their email address. 3. Twitter Lead Generation Card: similar to the previous point, this provides users with an incentive (content, whitepaper, free stuff) in exchange for their email address. Twitter makes this a single-click operation using their Lead Gen Card. 4. Competitions with data capture (email, name and other data that you determine important for your business). 5. Social content that drives users to a website or other property, for instance to purchase. 6. Drive app installs (or reactivate dormant users) using Twitter App Card and Facebook App ads. 7. Use Pinterest Rich Pins to drive referral visits to your website where you present visitors with a pop-up email form after a period of time. 8. Use YouTube annotations to embed clickable calls-to-action within the video. These can be used to increase YouTube channel subscriptions or for referral traffic to your website. 	<p><input checked="" type="checkbox"/> 7 Steps to Email Marketing Guide / <input type="checkbox"/></p>

Your next steps?

We hope you have found this guide useful in generating new ideas to manage social media marketing differently.

We hope you find this checklist useful, do ask any questions about social media marketing in our [Answers Forum](#) or [contact us](#).

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